

ASSESSORS' HANDBOOK
SECTION 222

STANDARD FORM LIST

JANUARY 2000

(USE FOR LIEN DATE JANUARY 1, 2000)

CALIFORNIA STATE BOARD OF EQUALIZATION

JOHAN KLEHS, HAYWARD
DEAN F. ANDAL, STOCKTON
CLAUDE PARRISH, TORRANCE
JOHN CHIANG, LOS ANGELES
KATHLEEN CONNELL, SACRAMENTO

FIRST DISTRICT
SECOND DISTRICT
THIRD DISTRICT
FOURTH DISTRICT
STATE CONTROLLER

E. L. SORENSEN, JR., EXECUTIVE DIRECTOR



PREFACE

Forms included on this list are intended for use throughout the state. An asterisk (*) preceding a form number indicates that the form is standard throughout the state as **prescribed** by the State Board of Equalization. All forms are recommended by the Policy, Planning, and Standards Division.

Most of the forms are designed to implement instructions contained in the *Assessors' Handbook* and are numbered to correspond with the Handbook section. In some cases, a Handbook section is not currently available. If you need a few copies of any particular form or a table of contents of Handbook Sections, you may obtain them directly from the Policy, Planning, and Standards Division.¹

This edition includes a column titled "Number of Sheets (2 pages per sheet)." Also, we indicate whether there is printing on both sides of the sheet and whether the sheet contains the instructions. Where the size of the paper is not 8 1/2 by 11 inches, we have provided the size; i.e., BOE-570-1L (8 1/2" x 14"). Our purpose in providing these data is that they may assist you in ordering forms.

We welcome your suggestions. We are interested in your thoughts on the way information appears in this Handbook Section and whether it improves your assessment system.

¹ A private party should obtain forms from the assessor of the county in which the property is located.

**POLICY, PLANNING, AND STANDARDS DIVISION
PROPERTY TAXES DEPARTMENT
REPRODUCIBLE FORMS LIST**

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		<u># of Sheets (2 pgs /sheet)</u>
			<u>Form Number</u>	<u>Dated</u>	
*BOE-58-AH	Claim for Reassessment Exclusion for Transfer Between Parent and Child (front and back)	6-99	BOE-58-AH	11-98	1
*BOE-58-G	Claim for Reassessment Exclusion for Transfer from Grandparent to Grandchild (front and back)	6-99	BOE-58-G	7-97	1
*BOE-60-AH	Claim of Person(s) at Least 55 Years of Age for Transfer of Base-Year Value to Replacement Dwelling (Itracounty and Intercounty When Applicable)	6-99	BOE-60-AH	11-98	1
*BOE-62	Disabled Persons Claim for Transfer of Base-Year Value to Replacement Dwelling (Intracounty and Intercounty When Applicable)	6-99	BOE-62	7-97	1
*BOE-63	Disabled Persons Claim for Exclusion of New Construction	6-99	BOE-63	6-93	1
*BOE-63-A	Claim for Disabled Accessibility Construction Exclusion from Assessment (front and back)	8-94	--	--	1
*BOE-64	Claim for Seismic Safety Construction Exclusion from Assessment (front and back)	11-98	BOE-64	3-16-94	1
*BOE-65-PT	Claim for Intercounty Transfer of Base-Year Value from Principal Residence Damaged or Destroyed in a Governor-Declared Disaster to Replacement Property (instructions on back)	10-98	--	--	1
BOE-121	Statement of Financial Interest (front only)	8-67	--	--	1

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			<u>Form Number</u>	<u>Dated</u>	
BOE-210-B	Map Book Index to Sub-divisions. Alpha or Numeric (front only)(17"x11")	8-98	AH 210-B	2-60	1
*BOE-231-AH	Welfare Exemption/Section 231 Change In Eligibility Or Termination Notice (front and back)	6-99	BOE-231-AH	9-98	
*BOE-236	Exemption Of Leased Property Used Exclusively For Low Income Housing (front only)	11-98	--	--	1
*BOE-236-A	Supplemental Affidavit For BOE-236 - Housing - Lower- Income Households (front and back, three pages of instructions)	11-98	--	--	3
BOE-258-AH	Request for Certificate of Security for Taxes on Personal Property (instructions on back)	11-98	AH 258	10-76	1
*BOE-260	Certificate and Affidavit for Exemption of Work of Art (instructions on back)	6-99	BOE-260	11-97	1
*BOE-260-A	Certificate and Affidavit for Exemption of Certain Aircraft (instructions on back)	6-99	BOE-260-A	11-97	1
*BOE-260-B	Claim for Exemption from Property Taxes of Aircraft of Historical Significance (front and back)	6-99	BOE-260-B	11-97	1
*BOE-261	Claim for Veterans' Exemption (front and back and two pages of instructions) (8 1/2" x 14")	6-99	BOE-261	11-97	2
BOE-261-B	Veterans' Service & Claim Record (front only)	10-81	AH 261B	12-20-74	1
BOE-261-C	Unrecorded Contract of Sale Declaration (front and back)	6-99	BOE-261-C	10-81	1
BOE-261-D	Soldier's and Sailor's Civil Relief Act Declaration (front only)	10-81	AH 261-D	1-10-66	1

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*BOE-261-G	Claim for Disabled Veterans' Property Tax Exemption (form--front and back; instructions--front and back)	6-99	BOE-261-G	11-98	2
*BOE-261-G NOTICE	Disabled Veterans' Exemption Change of Eligibility Report (front and back)	6-99	BOE-261-G NOTICE	11-98	1
BOE-261-H	Blind or Disabled Veterans' Service and Claim Record (front only)	8-98	AH 261H	10-1-80	1
*BOE-262-AH	Church Exemption (front and back)	6-99	BOE-262-AH	11-98	1
*BOE-263	Lessors' Exemption Claim (front and back)	6-99	BOE-263	11-98	1
*BOE-263-A	Qualified Lessors' Exemption Claim (front and back)	11-98	AH 263A	6-18-92	1
*BOE-264-AH	College Exemption (front and back)	6-99	BOE-264-AH	11-97	1
*BOE-265	Cemetery Exemption (two pages front and back; three pages of instructions)	6-99	BOE-265	11-98	
*BOE-266	Claim for Homeowners' Property Tax Exemption (instructions on back)	6-99	BOE-266	11-98	1
*BOE-266- CRD	Claim for Homeowners' Property Tax Exemption (CARD)(instructions on back)	6-99	BOE-266 CARD	11-98	1
*BOE-266-S	Spanish version, Claim for Homeowners' Property Tax Exemption (instructions on back)	6-99	BOE-266-S	11-98	1
*BOE-266- SCRD	Spanish version, Claim for Homeowners' Property Tax Exemption (CARD) (instructions on back)	6-99	BOE-266-S CARD	11-98	1
*BOE-266-D	Homeowners' Property Tax Exemption Cooperative Housing Information Request (front and back)	11-97	AH-266-D	10-1-90	1

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*BOE-267	Welfare Exemption (First Filing)(two pages, front and back; two pages of instructions)	6-99	BOE-267	11-97	
*BOE-267-A	Claim for Welfare Exemption (Annual Filing)(front and back)	6-99	BOE-267-A	11-98	1
*BOE-267-G	Welfare or Veterans' Organization Exemption Finding Sheet (six pages front and back self-carboned)	12-98	AH 267G	11-97	3
*BOE-267-H	Welfare Exemption Supplemental Affidavit, Housing--Elderly Or Handicapped Families (front and back; two pages of instructions)	6-99	BOE-267-H Income	5-94	2
*BOE-267-L	Welfare Exemption Supplemental Affidavit, Housing--Lower-Income Households (front and back; two pages of instructions)	11-98	AH 267L Income	5-26-94	2
*BOE-267-R	Welfare Exemption Supplemental Affidavit Rehabilitation--Living Quarters (Yearly Filing)(first page-front only; second page-front and back)	11-98	AH 267R	1-1-96	2
*BOE-267-S	Religious Exemption Claim (front and back)	6-99	BOE-267-S	11-98	1
*BOE-267-S NOTICE	Religious Exemption Change In Eligibility Or Termination Notice (instructions on back)	6-99	BOE-267-S NOTICE	11-98	1
*BOE-268-A	Exemption for Property Used Exclusively by a Public School (front and back)	11-98	BOE-268-A	11-97	1
*BOE-268-B	Exemption for Property Used by a Free Library or Free Museum (front and back)	6-99	BOE-268-B	11-98	1
*BOE-269-AH	Veterans' Organization Exemption	6-99	BOE-269	11-97	

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*BOE-270-AH	Exhibition Exemption (front only)	6-99	BOE-270-AH	11-97	1
*BOE-305-AH	Application For Changed Assessment (front only-instructions on back)	2-98	BOE-305-AH	7-97	1
*BOE-502-A	Preliminary Change of Ownership Report (front and back)	6-99	BOE-502-A	7-97	1
*BOE-502-AH	Change of Ownership Statement (front and back)	6-99	BOE-502-AH	7-97	1
*BOE-502-G	Change of Ownership Statement, Oil & Gas Property (front and back)	6-99	BOE-502-G	7-97	1
*BOE-502-P	Possessory Interests Annual Usage Report (front and back)	8-97	--	--	1
BOE 510-C	Industrial Property Appraisal Record	10-98	AH 510C	3-54	1
BOE 510-E1	Income Record (front only)	6-72	--	--	1
BOE 510-E-2	Expense Data (front only)	6-72	--	--	1
BOE 510-E-3	Shopping Center Appraisal Form (front only)	6-72	--	--	1
BOE-511-C	Urban Property Rental Record (front and back)	12-75	AH 511C	10-44	1
BOE-521-AH	Rural Property Appraisal Record (front and back)	8-98	AH 521	12-76	1
BOE-521-APT	Restricted Tree and Vine Valuation Record (front only)	7-97	AH-521-A	1-75	1
BOE-521-B	Tree and Vine Record (grid on back)	9-98	AH 520-B	12-76	1
BOE-521-C	Rural Property Sales- Rent Record (Farming Properties)(grid on back)	9-98	AH 520M-1	12-76	1
BOE-521-D	Grazing Sales and Rent Record (grid on back)	9-98	AH 520M-1	12-76	1
BOE-521-H	Farm Building Record (grid on back)	12-76	AH 521-H	3-75	1

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BOE-530-BAH	Commercial Building Record (front and back)	9-98	AH 530B	4-87	1
BOE-530-C	Industrial Building Record (front and back)	8-98	AH 530C	3-54	1
BOE-530-D	Service Station Record (front and back)	8-98	AH 530D	3-54	1
BOE-530-E	Miscellaneous Building Record (grid on back)	8-98	AH 530E	3-54	1
BOE 530-FPT	Manufactured Home Building Record (front and back)	7-97	AH 530F	6-6-80	1
BOE-530-G	Replacement Cost Record	8-82	--	3-54	1
BOE-530-GG	Structure Replacement Cost Record (front only)	8-98	--	3-54	1
BOE-530-I	Structure Cost Record (grid on back)	8-98	--	9-75	1
BOE-530-S	Improvement Summary Record (front only)	8-98	AH 530-E	3-54	1
BOE-530-X	Grid (8.5 x 11)(front only)	8-98	--	4-54	1
BOE-530-XX	Grid (17 x 11)(front only)	8-98	--	3-54	1
*BOE-540-S	Mutual or Private Water Company Property Statement (front and back)	6-99	BOE-540-S	1-96	1
*BOE-560-A	Aggregate Production Report (front and back; two pages of instructions)	6-99	BOE-560-A	1-96	2
*BOE-560-B	Mining Production Report (front and back; two pages of instructions)	6-99	BOE-560-B	1-96	2
*BOE-560-C	Mining Claim Production Report (front and back; one page of instructions)	6-99	BOE-560-C	1-96	2
*BOE-566-D	Oil and Dissolved Gas Production Report (front and back; two pages of instructions)	6-99	BOE-566-D	3-97	2

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*BOE-566-F	Dry Gas Production, Equipment, New Well, Redrill and Rework Report (front and back; two pages of instructions)	6-99	BOE-566-F	1-96	2
*BOE-566-J	Oil, Gas and Geothermal Personal Property Statement (instructions on back)	6-99	BOE-566-J	3-97	1
*BOE-566-K	Annual Oil and Gas Operating Expense Data (front and back; two pages of instructions)	6-99	BOE-566-K	3-96	2
*BOE-567-D	Geothermal Production Report (front and back; two pages of instructions)	6-99	BOE-567-D	9-98	2
*BOE-567-K	Annual Geothermal Operating Expense Data (front and back; two pages of instructions)	6-99	BOE-567-K	1-96	2
*BOE-570-1L	Supplementary Schedule to the Business Property Statement, Air Carrier's Operation Report (Flight Detail, Piston-Powered and Turboprop Types)(14" x 8 1/2")(instructions on back)	6-99	BOE-570-1-L	8-98	1
*BOE-570-1S	Supplementary Schedule to the Business Property Statement, Air Carrier's Operation Report (Flight Detail, Jet Engine Types Only)(14" x 8 1/2") (instructions on back)	6-99	BOE-570-1-S	8-98	1
*BOE-570-2	Supplementary Schedule to the Business Property Statement, Air Carrier's Operation Report (Flight Equipment Value Computation)(14" x 8 1/2") (instructions on back)	6-99	BOE-570-2	4-98	1
*BOE-570-3	Supplementary Schedule to the Business Property Statement, Air Carrier's Operation Report (Aircraft Value Computations)(14" x 8 1/2")(instructions on back)	6-99	BOE-570-3	8-98	1

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*BOE-571-A	Agricultural Property Statement (short form--four pages of form; four pages of instructions)	6-99	BOE-571-A	6-98	4
BOE-571-AH	Equipment and Inventory Appraisal Record	8-98	BOE-571-AH	8-72	1
BOE-571-B	Equipment Replacement Cost Record (front only)	8-98	AH-571-B	4-7-71	1
BOE-571-C	Power Plant Property Statement	6-99	BOE-571-C	6-98	6
*BOE-571-D	Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported Schedule B of the Business Property Statement (front and back)	6-99	BOE-571-D	6-98	1
*BOE-571-F	Agricultural Property Statement (four pages of form; four pages of instructions)	6-99	BOE-571-F	6-98	4
BOE-571-F2	Registered and Show Horses Other Than Racehorses (instructions on back)	6-99	BOE-571-F-2	8-98	1
BOE-571-J	Annual Racehorse Tax Return (front only; two pages of instructions)	6-99	BOE-571-J	11-98	2
BOE-571-J1	Annual Report of Boarded Racehorses (instructions on back)	6-99	BOE-571-J-1	10-85	1
*BOE-571-K	Horse Property Statement (Other Than Racehorses)(front and back; two pages of instructions)	6-99	BOE-571-K	8-98	2
*BOE-571-L	Business Property Statement, long form (three pages of form printed vertically; four pages of instructions)	6-99	BOE-571-L	9-98	4
*BOE-571-L Alternate	Alternate Schedule A for Bank, Insurance Company, or Financial Corporation Fixtures (front only; instructions on back)	6-99	BOE-571-L Alternate	6-98	1

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*BOE-571-M	Miscellaneous Property Statement (front only; includes instructions)	6-99	BOE-571-M	3-97	1
*BOE-571-P	Pipeline Property Statement (front and back; two pages of instructions)	6-99	BOE-571-P	3-96	2
*BOE-571-R	Apartment House Property Statement (instructions on back)	6-99	BOE-571-R	11-98	1
*BOE-571-RW	Right-Of-Way Property Statement (front and back; two pages of instructions)	11-98	AH 571-RW	3-13-96	2
*BOE-571-S	Business Property Statement, short form (front and back; four pages of instructions)	6-99	BOE-571-S	6-98	3
*BOE-572	Insurance Company Separate Account Property Statement (instructions on back)	5-96	--	--	1
*BOE-572-A	Insurance Company Statement of Transfer (instructions on back)	8-98	--	10-11-96	1
BOE-576-A	Vessel or Aircraft Form	8-98	AH 576A	8-81	1
BOE-576-BAH	Vessel Form (front and back)	8-98	AH 576B	8-3-81	1
BOE-576-B1	Vessel Owner's Report (front and back)	6-98	AH 576-B1	8-3-81	1
BOE-576-C	List of Vessels (front only)	6-98	AH 576C	2-76	1
*BOE-576-D	Vessel Property Statement (instructions on back)	6-99	BOE-576-D	11-98	1
*BOE-576-E	Affidavit for 4 Percent Assessment of Certain Vessels (front only)(instructions on back)	6-99	BOE-576-E	11-97	1
BOE-577-AAH	Aircraft Form (front and back)	8-98	AH 577-A	8-3-81	1
BOE-577-B	List of Aircraft (front only)	6-98	AH 577-B	8-3-81	1

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BOE-740-A	Application for Temporary Appraiser's Certification (front and back)	12-98	740-A	2-76	1
BOE-742-A	Training Courses for Property Tax Appraisers (front and back)	5-99	BOE-742-A	12-98	1
BOE-742-B	Certificate of Training (Property Taxes) (successful completion; front only)	12-98	PT-747-D	2-92	1
BOE-743-A	Reporting of Property Appraiser's Change in Employment Status to the State Board of Equalization (front and back)	12-98	C-743A	6-97	1
BOE-744-A	Report to the State Board of Equalization of Completed Training Courses (front and back)	3-99	BOE-744-A	12-98	1
BOE-745-A	Request for Course Approval (front only)	12-98	C-745-A	1-1-72	1
BOE-746-A	Board of Equalization Course Registration Form (front only)	5-99	BOE-746-A	12-98	1
BOE-747-PT	Certified Property Tax Appraiser (front only; Board use only)	5-98	C-747	6-92	1
BOE-747-APT	Advanced Certified Property Tax Appraiser	5-98	--	8-90	1
BOE-747-BC	Application for Advanced Appraiser Certification (front only)	2-99	BOE-747-BC	12-98	1
BOE-886-PT	Possessory Interest Appraisal Record (front and back)	7-97	AH 517	2-74	1
BOE-887-PT	Residential Building Record (front and back)	7-97	AH 530A	1971	1